

SERVICE

INTRODUCTION TO WORK ORDERS

A **work order**, or job card is an order for work to be performed for a **Company** or a **Customer**. All transactions concerning this work, such as part issues, labour time, etc. are logged against the work order.

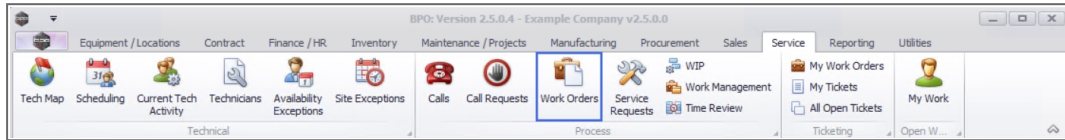
When work is required for a **Customer**, a **Call** is raised. The system will generate a work order in the background. Transactions are logged on the call, but stored against the work order. More than one work order can be linked to a call, for example, when different tasks need to be performed to complete one call.

When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

- If the work is for Building Maintenance, or Training, then the work order must be linked to a **functional location**, which must be set up before hand.
- If the work required is for an **asset**, e.g. repair a machine in store to be sold refurbished, then the machine is linked to the **call**.
- **Manual** work orders can be linked to a **project** to group them, e.g. at the beginning of the year create a project for 'Non Stock Company Purchases', create a work order each month to raise non-stock requests and transactions. Each work order is closed at the end of the month and the project is closed at the end of the year.
 - This is good practice for when logging a great deal of transactions through manual work orders.

- If not, stick to one work order per requirement, e.g. Training, Maintenance, and keep the work order open.

Ribbon Access: *Service > Work Orders*



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** you wish to work in.
 - The example has Durban selected.
3. The screen lists all **Open** work orders by default.
 - Select the work order status you require.

Work Order Status

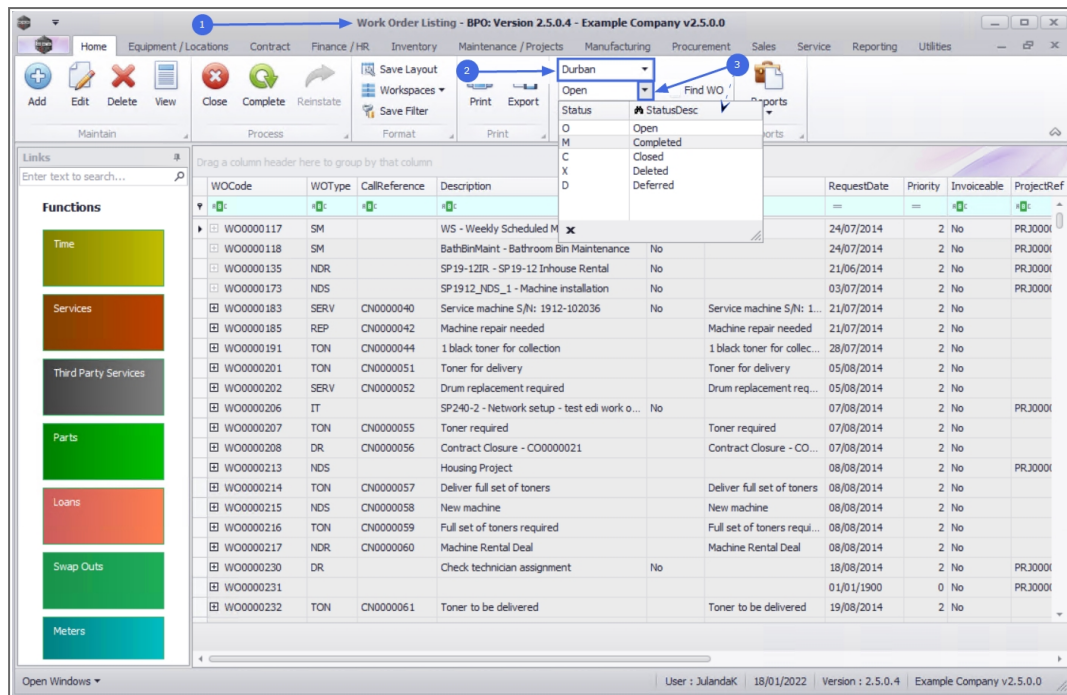
O - Open - work is yet to be done

M - Completed - work is done, but not signed off (to be used only with manual work orders)

C - Closed - work is done and signed off

X - Deleted - work orders that have been deleted

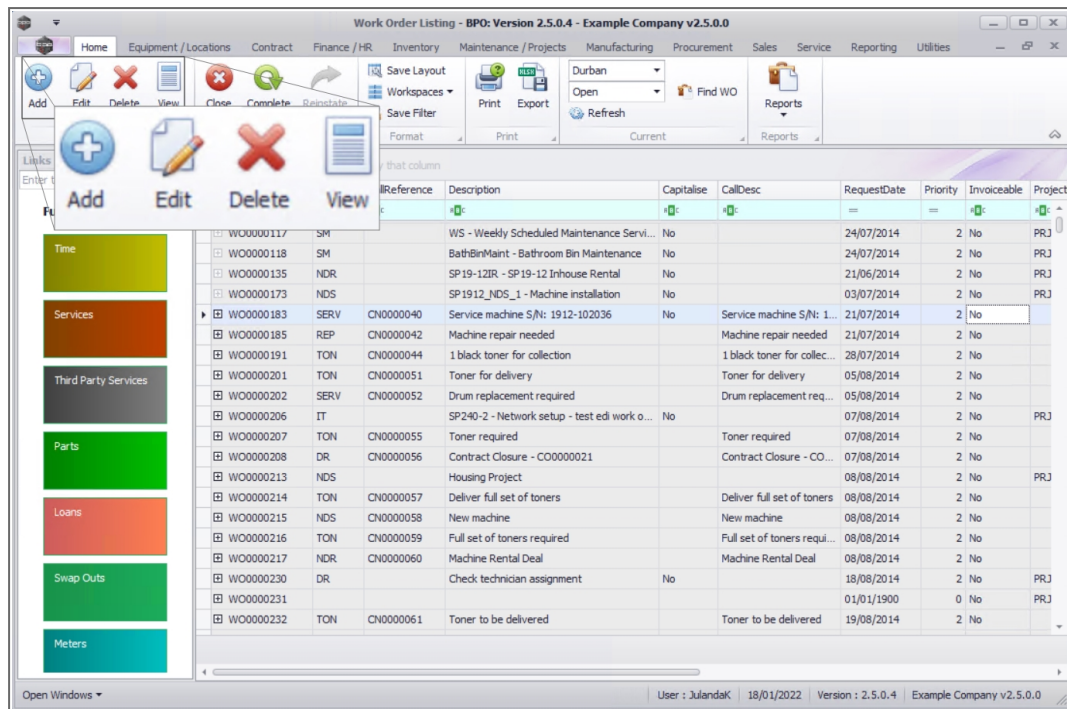
D - Deferred - work orders that have been placed on hold



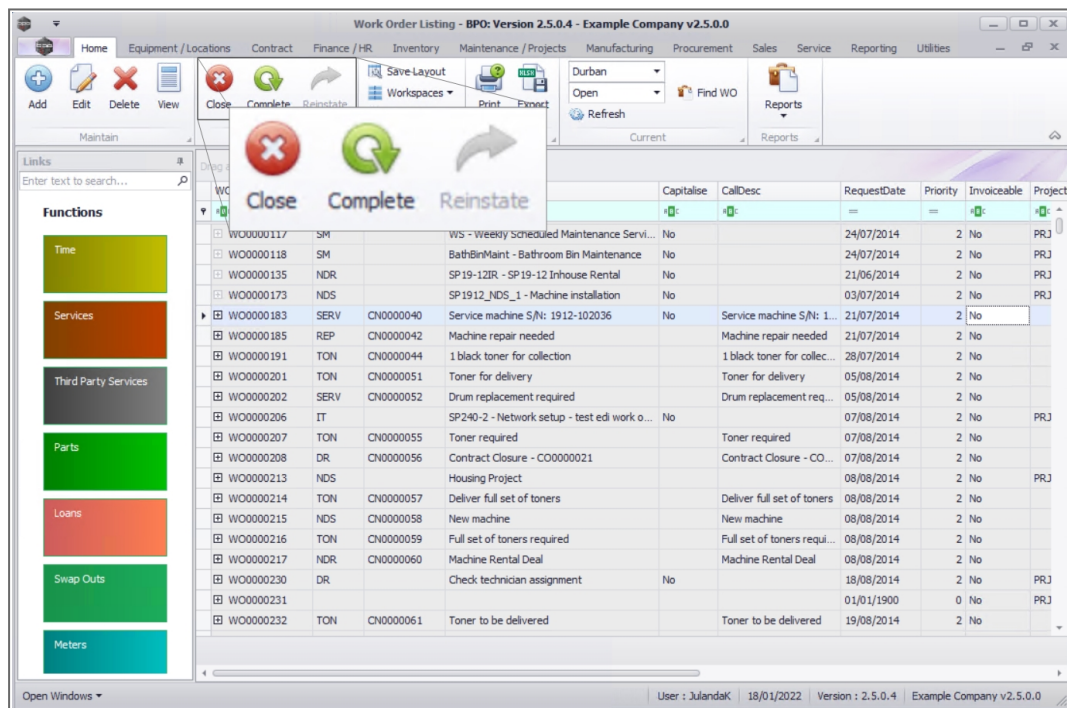
RIBBON ACTION BUTTONS

The Work Order ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

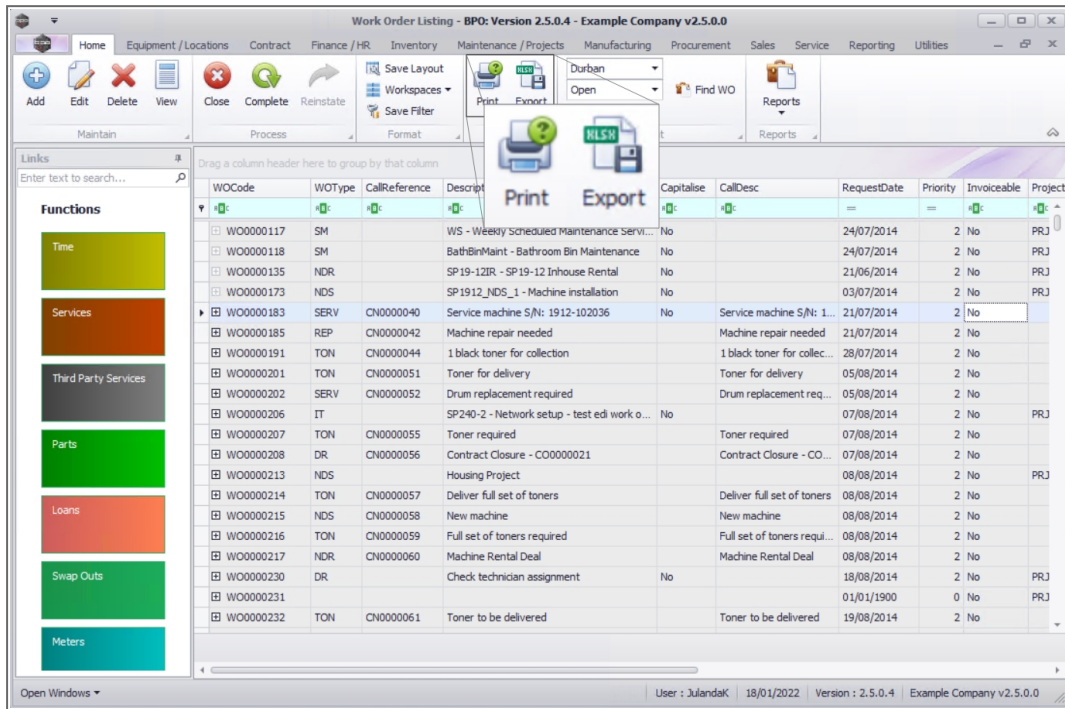
Use the Maintain buttons to [Add](#), [Edit](#), [Delete](#) and [View](#) a work order.



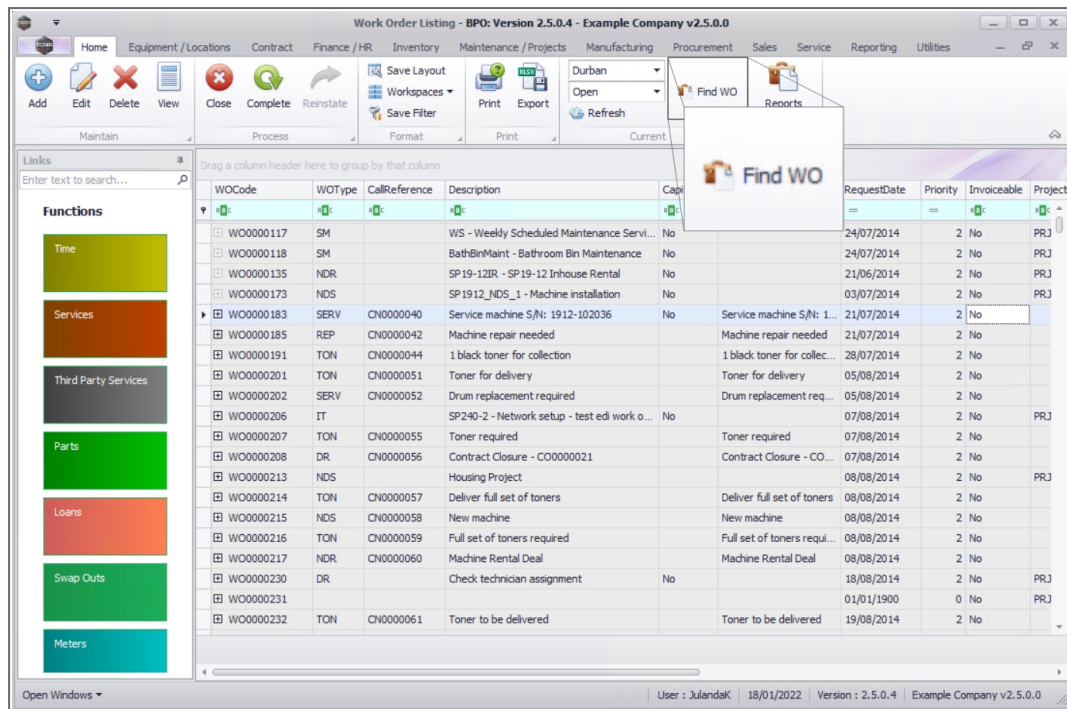
Use the **Process** buttons to **Close**, **Complete** or **Reinstade** a selected work order.



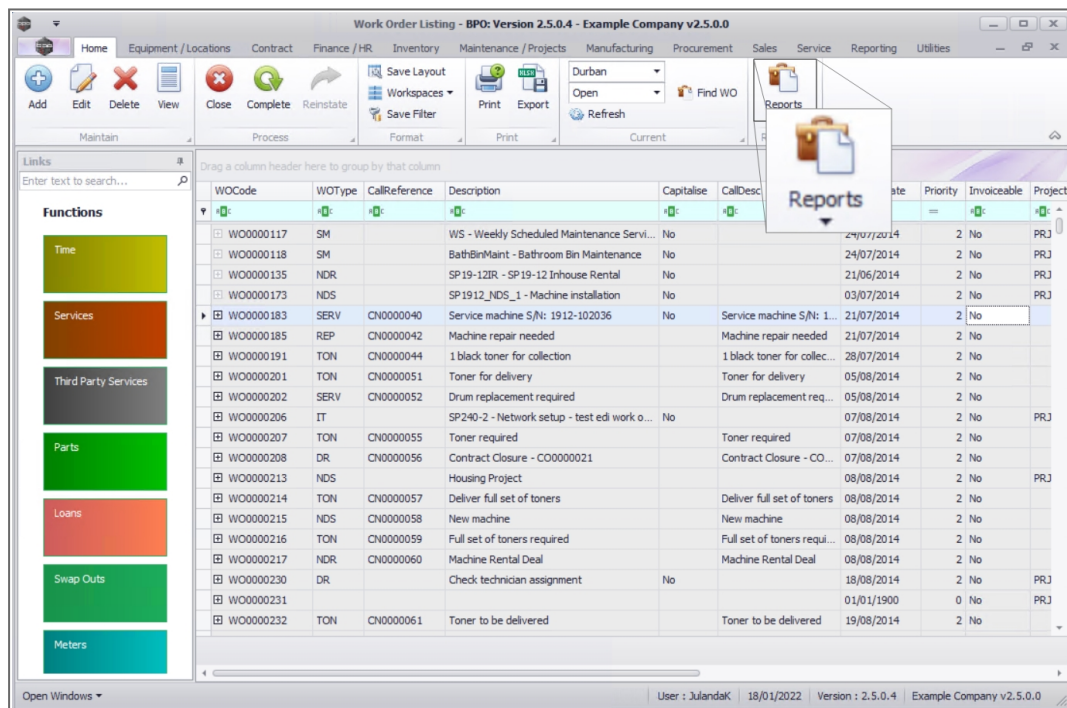
The **Print** button will generate a Work Order Report for the selected work order. Use the **Export** button to export the list of Work Orders in the required status to an Excel Spreadsheet.



Use **Find WO** to search for a specific Work Order by typing in the Work Order number.



Click on **Reports** to select Custom Work Order report(s) from the reports drop-down menu.

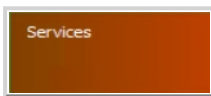


FUNCTION TILES

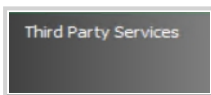
The Functions panel is also available from the *Work Order Listing* and the *Maintain Work Order* screen.



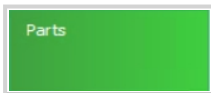
The [Times](#) tile will direct you to the Time bookings for WO screen where you can **Add**, **Edit**, **Delete** and **Export** the time logged against a work order. Refer to [Work Orders - Time Booking](#)



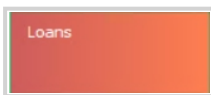
The [Services](#) tile will direct you to the Internal Services for the selected Work Order screen where you can **Add**, **Edit** and **Delete** an internal service from the work order. Refer to [Work Orders - Internal Services](#)



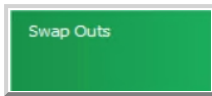
The [Third Party Services](#) tile will direct you to the Service Requests for WO Code screen where you can **Add**, **Edit**, **Delete** and **Export** service requests logged against the work order. Refer to [Work Orders - Third Party Service Request](#)



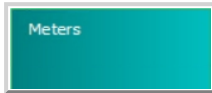
The [Parts](#) tile will direct you to the Part Requests linked to a Work Order Code screen where you can **Add**, **Edit** or **Delete** a Part Request, as well as generate a **Requisition** for the part request, **Issue** the part request, add a **Note**, **Change the Warehouse**, **Remap** the part request and **Print a Picking Slip**. Refer to [Work Orders - Part Requests](#)



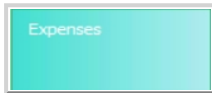
The [Loans](#) tile will direct you to the Loan Requests for Work Order Code screen where you can **Request a Loan Unit**, **Edit** and **Delete** the Loan Unit, Request a Loan Unit **Return** and Print the **Loan Unit Delivery** and **Loan Unit Return Notes**. Refer to [Work Orders - Loans](#)



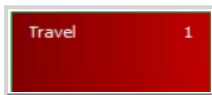
The [Swap Outs](#) tile will direct you to the Swap Outs for WO Code screen where you can Add a Swap out and Export the list of Swap Outs for the work order. Refer to [Work Orders - Swap Outs](#)



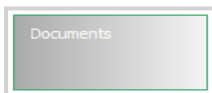
The [Meters](#) tile will direct you to the Meters for WO Code screen where you can **view** and **edit** the meter readings for equipment linked to the work order. Refer to [Work Orders - Meters](#)



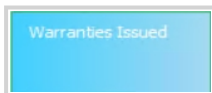
The [Expenses](#) tile will direct you to the Expense Claims for work order screen where you can **Add**, **Edit** or **Delete** an expense claim. Refer to [Work Orders - Expenses](#)



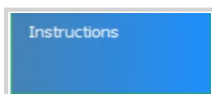
The [Travel](#) tile will direct you to the Travel Claims for Work Order screen where you can **Add**, **Edit** or **Delete** travel claims for the Work Order. Refer to [Work Orders - Travel](#)



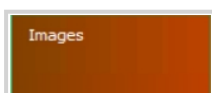
The [Documents](#) tile will direct you to the Documents for Work Order screen where you can **Add**, **Edit**, **Delete** and **View** the documents linked to the Work Order. Refer to [Work Orders - Documents](#)



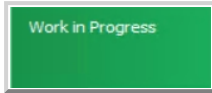
The [Warranty Issued](#) tile will direct you to the Issued Warranties for Work Order Code screen where you can **Add**, **Edit** and **Delete** warranties for the items linked to the Work Order. Refer to [Work Orders - Warranties Issued](#)



The [Instructions](#) tile will direct you to the Instructions for Work Order Codes screen where you can **Add**, **Edit**, **Delete** and **Complete** an instruction. Refer to [Work Orders - Task Instructions](#)



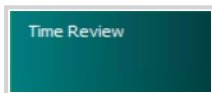
The [Images](#) tile will direct you to the Images or Work Order Code screen where you will be able to view the names of employees, image stock and the dates images were linked to the work order. Refer to [Work Orders - Images](#)



The [Work in Progress](#) tile will direct you to the Work in Progress for Work Order Code screen where you can view stock or internal assets that have been issued, as well as Third Party Services that were delivered. From here you can do a ***Return Request***, ***Invoice a work order*** or ***Invoice a Call***. Refer to [Work Orders - Work in Progress \(WIP\)](#)

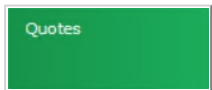


The [Maintenance](#) tile will direct you to the Maintenance Methodology for Asset / Location screen. From here you can ***Add***, ***Edit*** or ***Delete*** a scheduled task. Refer to [Work Orders - Maintenance](#)

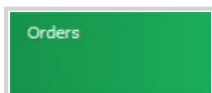


The [Time Review](#) tile will direct you to the Time Not Billed for Work Order code screen where you can ***Invoice a WO*** or ***Invoice a Call***, ***Flag time as Reviewed***, view the ***SLA Time***, or ***View the Work Order*** or ***Call***. Refer to [Work Orders - Time Review](#)

PROCESSING TILES



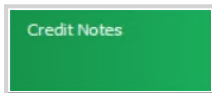
The [Quotes](#) tile will direct you to the Sales Quotes for Work Order screen where you can ***Add***, ***Edit***, ***Delete*** and ***View*** a quote as well as do the necessary processing like, ***Accept***, ***Reject***, ***Covert*** or ***Clone*** a Quote. Refer to [Work Orders - Sales Quotes](#)



The [Orders](#) tile will direct you to the Sales Orders for Work Order screen where you can ***Add***, ***Edit***, ***Delete*** and ***View*** a sales order. You can also do the necessary processing like, ***Create Invoice***, ***Create New Deal***, ***Add Items to Work Order*** and do a ***New Deal Project*** as well as ***Print a the Sales Order*** and ***Proforma Invoice***. Refer to [Work Orders - Orders](#)



The [Invoices](#) tile will direct you to the Sales Invoices for Work Order screen where you can **Add**, **Edit** and **View** the sales invoice. You also have the facility to add a **Comment and Reference**, **Print the Invoice** and **Send Invoices To Print Queue**. Refer to [Work Orders - Invoices](#)



The [Credit Notes](#) tile will direct you to the Sales Credit Notes for Work Order screen where you can **Add**, **Edit**, **Delete** and **View** a credit note, as well as do the necessary processing like **Release for Approval**, **Remove from Approval**, **Approve Cr Note** and **Reject Cr Note**. You can also **Print** the credit note and **Send Cr Notes to Print Queue**. Refer to [Work Orders - Credit Notes](#)

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